

# HILTON HEAD ISLAND ECONOMIC DEVELOPMENT CORPORATION

## REQUEST FOR PROPOSALS HHIEDC SECOND HOME OWNER OUTREACH STRATEGY RFP 2015-0001

The Hilton Head Island Economic Development Corporation (“HHIEDC”) is a nonprofit corporation (501(c)(3) application pending) created by the Hilton Head Island Town Council to help grow and diversify the Town of Hilton Head Island economy. The HHIEDC seeks qualified marketing and public relations firms to submit a proposal (“Proposal”) to assist the HHIEDC in developing and implementing a marketing and outreach strategy to reach second home owners with our economic development and business attraction messages (to wit, that the Town of Hilton Head Island offers a unique opportunity for individuals who wish to live and own/operate a business on the Southeast coast).

### Background

Hilton Head Island (“HHI”) enjoys a reputation as a world-class vacation destination, and the Island also attracts significant second home investment. Over 17,000 properties on the Island are owned by non-residents (based on Beaufort County tax assessment records), not including time share/fractional ownership interests.

The Town of Hilton Head Island (“Town”) is home to approximately 40,000 residents who claim the Town as their primary residence. Many businesses are also located in the Town. Most provide goods or services to Hilton Head and lowcountry residents and visitors. There are, however, many companies located in the Town that are here solely because the owner or principal of the company wanted to live on HHI and moved or started their business here ancillary to choosing HHI as their place of residence.

### Challenge

Unlike most communities and economic development organizations which market their locations first and foremost as a business destination, the HHIEDC believes its most effective business attraction strategy is to promote HHI’s lifestyle advantages to business owners who can expand or relocate their business to the Town. An important target for this message is the owners of second homes on HHI. Therefore, the HHIEDC seeks to develop and implement a plan that directly targets individuals who are already familiar with HHI and who have evidenced their affinity for HHI by purchasing real estate here, either for part-time residential use or as an investment property.

### Project Objectives/Scope of Work

The HHIEDC is seeking a qualified vendor/consultant who will support the HHIEDC in the design and delivery of the **Second Home Owner Outreach Project** (“Project”). The objectives of the Project are as follows:

1. To identify individuals (or groups of individuals) who own second homes on HHI;

2. To develop a survey instrument to gather data from second home owners for the purpose of determining if the second home owner has an interest in starting a business or expanding or relocating a business on HHI. The survey instrument should determine the following:
  - If there are second home owners who have an interest in starting a business, relocating a business or expanding a business on HHI.
  - If there are second home owners who do not have an interest in starting/relocating/expanding a business on HHI at this time, but who would want to be added to a mailing list to receive HHIEDC communications.
  - The manner in which a second home owner would conduct business in the Town, including:
    - Starting a new business on HHI;
    - Relocating a business from its current non-HHI location to HHI; or
    - Establishing a secondary or satellite location on HHI for a business whose primary location is elsewhere.
  - The requirements for the second home owner to start a business on, or expand or relocate a business to, HHI, including:
    - Real estate (purchase, lease, zoning, square footage, etc.);
    - Telecommunications capabilities;
    - Workforce/staffing/skills needs; and
    - Other requirements.
  - The value-added services or opportunities may be needed to incentivize second home owners to expand or relocate a business on HHI, including:
    - Access to local expertise or professionals;
    - Financial incentives; and
    - Other services or products.
3. To design the survey instrument with a dual purpose, so that it can also be used as a marketing tool specifically directed to second home owners; marketing elements would include, without limitation:
  - Promoting HHI as a friendly and convenient place to do business;
  - Promoting the Island's resort lifestyle as a business asset; and
  - Promoting the HHIEDC as the point of contact for those interested in locating a business in the Town.
4. To identify at least two (2) alternative methods of administering the survey instrument to second home owners (e.g., mail and telephone) and the rationale on why the recommended method(s) constitute the "best practice" for the Project;
5. To administer the survey instrument using the methods identified and approved;
6. To analyze the data received from the survey instrument responses;

7. To identify the trends or commonalities as evidenced from the response data collected; and
8. To provide a summary of the trends or commonalities from the data analysis to the HHIEDC.

### Project Deliverable

The Project deliverable is a report (“Report”) that summarizes the data analysis results from the survey instrument. The deliverable should include anecdotal comments from second home owners that reinforce the key conclusions of the Report. The Report must be constructed in such a way to guide the HHIEDC in the development of future plans and actions related to second home owners as a potential source of business/economic development for the Town. The Report must be delivered on or prior to 12:00 noon on Monday, June 22. The consultant should also be prepared to present the Report and its summary conclusions and recommendations to the HHIEDC Board of Directors at the June 23 meeting of the Board of Directors (9:00 a.m. Palmetto Electric Cooperative Community Room, 111 Mathews Drive, Hilton Head Island).

To support the consultant in the execution of the Project, the HHIEDC has obtained from the Beaufort County Tax Assessor a database containing 17,641 (non-normalized) records containing data (name, address, property location, and property value) for residential real estate that is listed as non-primary residence (i.e. assessed at 6% valuation). A critical, early step in the execution of the Project is for the consultant to validate whether the database can serve as a valid and effective source of information to establish contact with second home owners. If additional data is needed, the consultant will need to identify other methods to obtain the information needed to complete the Project.

### Proposals

Each Proposal shall include the following:

1. The name of the submitting firm or individual.
2. A description of the experience of the firm or individual in designing similar or relevant plans or strategies, with references to specific projects and clients, dates when the project was undertaken, a short description of the timeframe of the project from its inception to conclusion, and the outcomes/results achieved in each project.
3. Résumés of the professional staff who would perform the work for the HHIEDC, including relevant qualifications and experience. If the Proposal contemplates the engagement of any subcontractors, a description of each subcontractor and the specific individuals who will work on the Project, their relevant experience and a specific description of the work that each subcontractor will perform.
4. A minimum of three (3) references from jurisdictions for which the firm or individual performed similar or related work to include names, titles, email addresses and telephone numbers.
5. The fee for services, which shall be broken down for each component of the Project, and the terms of payment.
6. Any other information the submitting firm or individual wishes to submit to support its capabilities to undertake the HHIEDC project.

Proposals are due by **2:00 pm on or before Friday, April 10, 2015**. Proposals should be

executed by an authorized representative of the submitting firm or individual and hand delivered to the offices of the HHIEDC at 4 Northridge Dr., Suite C, Hilton Head Island, SC 29926 or emailed to dkirkman@hhiedc.com. Proposals must be clearly marked “RFP 2015-0001 HHIEDC SECOND HOME OWNER OUTREACH STRATEGY.” Proposals must fully address all requirements to be considered responsive.

### Selection Criteria

The HHIEDC will utilize the following criteria in evaluating Proposals.

1. The total proposed fee for services.
2. The firm or individual’s demonstrated experience on past projects of comparable scope and complexity, with an emphasis on projects completed within the past five years.
3. The firm or individual’s demonstrated understanding of the scope of work evidenced by the quality and thoroughness of their Proposal and responsiveness to the Project requirements.
4. The information provided by the references provided to the HHIEDC by the submitting firm or individual.

### RFP Evaluation and Contract Award Process

The review of Proposals will occur as soon as practical following the date they are received. A selection committee comprised of members of the HHIEDC Board of Directors and staff will review all proposals utilizing the selection criteria reflected in this Request for Proposals. The review will include evaluating all proposals for completeness and compliance with the minimum requirements of this RFP. Those proposals deemed responsive and responsible will then undergo a more extensive review that will include a validation of referenced previous projects and comprehensive analysis of the proposed scope of work. The HHIEDC selection committee may elect to invite one or more submitting firms for interviews, but is not required to conduct interviews. If the HHIEDC elects to hire a vendor/consultant as a result of this Request for Proposals, it is anticipated that the contract will be awarded no later than Tuesday, April 28.

This RFP may be viewed at <http://hiltonheadislandsc.gov/econdev/> and at <http://hhiedc.com/about-the-hilton-head-island-economic-development-corporation/>.

For questions about this RFP, contact Don Kirkman, Executive Director of the Hilton Head Island Economic Development Corporation, at 843-686-0868.

The EDC reserves the right to accept or reject any or all proposals received as a result of this RFP, to negotiate with all qualified offerors, or to cancel in part or in its entirety this RFP if it is in the EDC’s best interest to do so. This solicitation does not commit the EDC to award a contract or to pay for any costs incurred in the preparation of any proposal or to procure or contract for any goods or services, and the EDC reserves the right to negotiate price and other terms with any firm or person submitting a proposal.

**The EDC does not discriminate on the basis of race, color, national origin, sex, religion, age or disability in employment or in the provision of goods and services.**